MAINTAIN OWNERS/OFFICERS

Introduction	This section of the document will explain how an authorized user can view/modify/add owner/officer information.
Helpful Hints	• The combined ownership percentage of all owners on the account cannot exceed 100%. • It is not possible to add a second owner/officer when the business type is sole proprietorship. • The owner can be an individual owner or a legally formed entity. • The ownership information that can be added to an account is limited to five.

Step-by-Step Instructions:

Viewing owner/officer information:

1. Navigate to the account maintenance home page using the instructions provided in the section – 'Navigating to Account Maintenance'.

2. Click on the 'Maintain Owners/Officers' link from the list of available maintenance functions. The screen shown below will appear and you can view the owner/officer information.
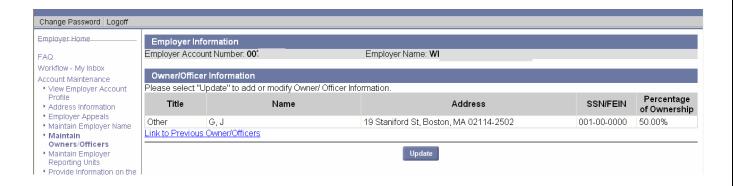
   NOTE: If you wish to see the history associated with the owner/officer information, click on 'Link to Previous Owner/Officers'.
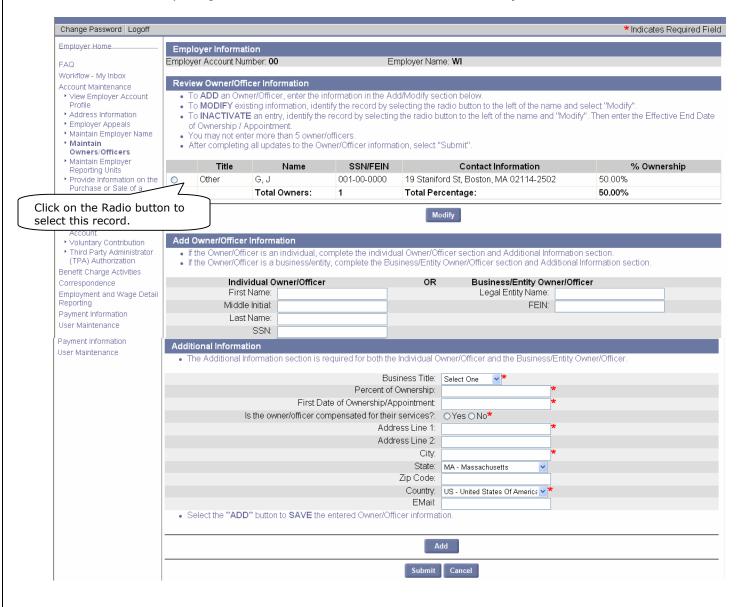

Modifying owner/officer information:

1. Navigate to the account maintenance home page using the instructions provided in the section – 'Navigating to Account Maintenance'.

2. Click on the 'Maintain Owners/Officers' link from the list of available maintenance functions.

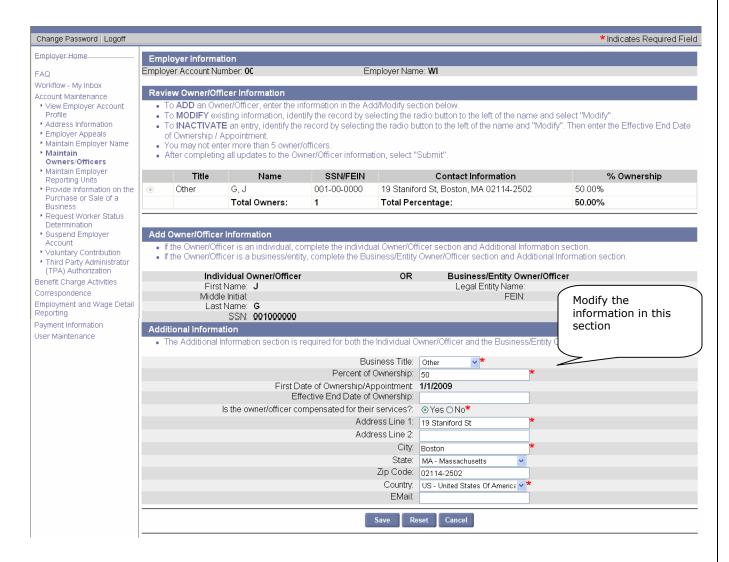3. The following page will appear. Click on 'Update'.

4. The following page will appear, listing the existing addresses. Choose the address you wish to modify using the radio button to the left. Click on the **'Modify' button**.

Click on the Radio button to select this record.

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5. The following page will appear. Make changes as necessary and click on the 'Save' button to complete the changes.

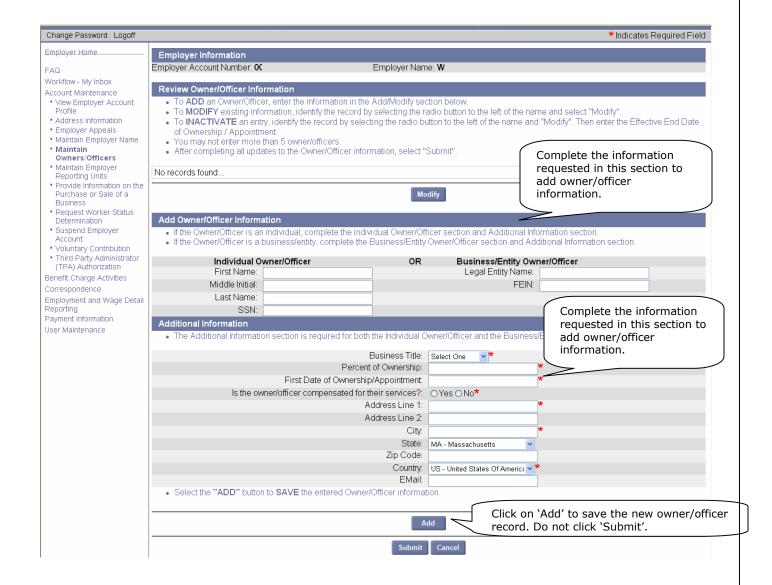*To inactivate an existing owner/officer enter the effective end date of ownership.*

Adding owner/officer information:

1. Navigate to the account maintenance home page using the instructions provided in the section – 'Navigating to Account Maintenance'.

2. Click on the 'Maintain Owners/Officers' link from the list of available maintenance functions. The following page will appear. Click on 'Update'.
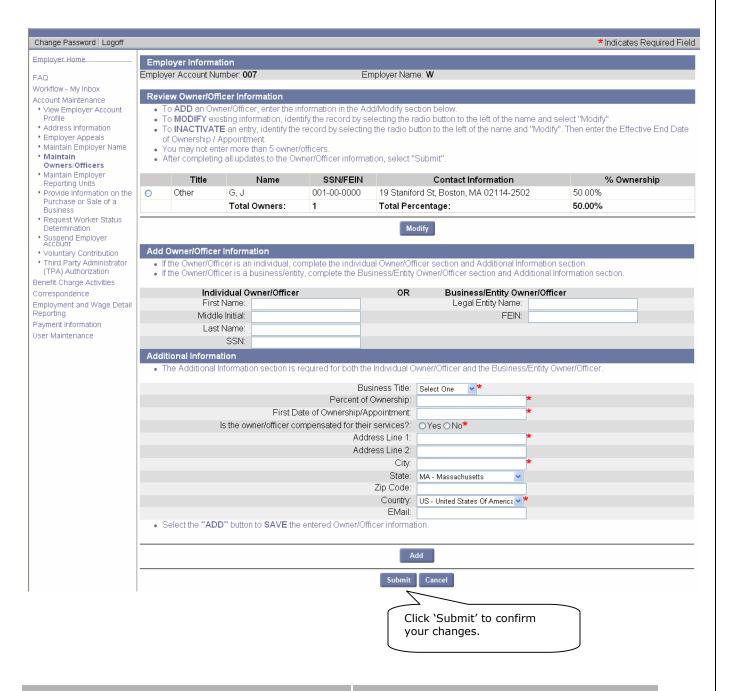
3. The following page will appear. Enter the requested information here.

NOTE: If you are adding a legal entity as owner/officer, the only identifying information provided should be the name of the Legal Entity and FEIN. If an individual is being added as owner/officer, the only identifying information provided should be the individual's name and SSN. **Do not enter both sets of identifying information under the same record.**

4. The following screen will appear, summarizing the owner/officer information you just added. Click on the 'Submit' button at the bottom of the page to complete the addition of the record.

Click 'Submit' to confirm your changes.

If	Then
Change of owner/officer information is due to purchase or sale of a business	You must use the process 'Provide information on the sale or purchase of a business.'